Partnership Checklist

1. Defining the partnership

Values…what do we know about each other?
- ❑ Has a clear public interest been identified?
- ❑ Do partners have a clear understanding of the other's organization (objectives, processes, policies, interests, values, and constraints)?
- ❑ Is the partnering effort compatible with our respective missions and resources?
- ❑ Is there a clearly evident (value-added) benefit to working together?
- ❑ Do partners' assets and liabilities (time, staff, organizational capacity), public image, and constituency characteristics meet each other's needs?

Vision…what do we want to achieve?
- ❑ What is the purpose of the partnership?
- ❑ What general conditions must exist to be successful?
- ❑ Who are the existing partners or potential partners? Are they the right partners?
- ❑ Who are the affected stakeholders?
- ❑ Where and when will the activity take place?
- ❑ Have goals and objectives and mutual benefits been identified?

Stamina…what must we always have to make the vision happen?
- ❑ Have we agreed who (and how we) will make decisions?
- ❑ Do we have compatible expectations about the outcomes?
- ❑ Are we focused on meaningful outcomes?
- ❑ Have we defined the limitations, risks, and constraints facing us?
- ❑ Do we have the needed skills, resources and motivation necessary to sustain the relationship?
- ❑ Are timeframes, assets and milestones in place to accomplish our goals?
- ❑ Do we have the passion, patience, imagination, persistence and leadership to make this happen?
- ❑ Have we established an atmosphere of trust, candor, honesty and respect to move the partnership forward?

2. Work Plan and Agreement

Information …What are the specific goals and objectives of the partnership?
- ❑ Do we have a marketing plan in place to engage with others and promote the work?
- ❑ Has a communication plan been developed to construct messages and disseminate them to affected parties?

Planning, Budget, and Authority Needs – What are the specific tools we need to meet requirements?
- ❑ Is the need identified in Master Plans, OMP or 5-year work plan?
- ❑ Are budget packages included for the partnership and in out years if necessary?

- ❑ Is it identified in other local, regional or national initiatives, and if so, how do we complement it?
- ❑ Do we have the legal authority to enter into the partnership?
- ❑ Have we clarified guidance and regulations for any uncertainties?
- ❑ Do we have authority to work with NGOs?

Resource Assessment – what capacity and mustering does it take to do the job?

- ❑ Who's going to work on this? Are team leaders trained and well versed in partnering methods and limitations? Who will step in if a team member leaves?
- ❑ Have sources of funding been identified?
- ❑ Do we have strategies for closing the gaps between needs and available resources?
- ❑ Is there an estimate of the total resources needed?
- ❑ Do we have the resources to fulfill our end of the partnership?
- ❑ Is a fundraising campaign by the partner required?
- ❑ Is funding being solicited by the partner?
- ❑ Is the partner a federal agency?
- ❑ What in-kind services are offered?

Business Planning – what business details are critical to our success?

- ❑ What tools and agreements do we have to make this happen?
- ❑ Has the proper type agreement been selected?
- ❑ Has the draft agreement been reviewed by the appropriate decision makers and by legal counsel?
- ❑ Will the activity be accomplished in one fiscal year? Does the timeframe match the appropriate tool?
- ❑ Does the partnership involve a transfer of funds?
- ❑ Does the activity take place on leased or licensed land?
- ❑ Will the activity involve a long-term commitment from the partner for maintenance?
- ❑ Does the activity involve a contract?
- ❑ Will the partner or the Corps administer the contract(s)?
- ❑ How will use of partnered resources be documented?
- ❑ Are procedures in place to deal with conflict?
- ❑ Has a project delivery team been formed?
- ❑ Are PMBP/corporate management principles applied?
- ❑ Is a process for auditing in place?

Compliance – What are our legal obligations and concerns?

- ❑ Have historic properties, environmental and other issues been identified?
- ❑ Who will cover these clearances?
- ❑ Do regulations held by our partners have negative implications for us?
- ❑ Are partners aware of ethical issues tied to fundraising?
- ❑ Are there ethical issues tied to recognition?
- ❑ Are there image issues with a prospective partner?
- ❑ Have we addressed the use of uniforms, agency icons, logos and imagery?

❑ Can partners use real property?
❑ Can partner's use capitalized and office property?

3. Implementation

<u>Create a Positive Culture - How do we keep everyone happy?</u>

❑ Have we identified clear shared responsibilities and shared benefits?
❑ Do we offer real incentives?
❑ Have we used resources as effectively and efficiently as possible?
❑ Have we made an effort to keep legal documents as simple as possible?
❑ Does everyone have a sense of ownership for the land/resource involved?
❑ Do we emphasize the importance and rewards of partnerships?

<u>Celebrate Success and Have Fun – How do we honor our partners?</u>
    ❑ How do we recognize the great work our partners have done?
    ❑ What can we legally purchase/provide for celebration activities?
    ❑ Were recognition efforts both internal and external (certificates, news articles, ceremonies, etc.)?
    ❑ Were political officials and other important stakeholders included?

<u>Evaluation</u>
    ❑ Are lessons learned incorporated into current practices?
    ❑ Were the results of the partnership worth the time and effort spent?
    ❑ Were the stated goals/objectives accomplished?
    ❑ What was the actual cost vs. initial estimate?
    ❑ How much time did you actually spend on this partnership - actual cost vs. initial estimate?
    ❑ Has the partnership been successful according to the measures identified?

Milestones in the planning/implementation process

<u>Initial Phase</u>
    ❑ Desired priority?
    ❑ Policy: consistency and appropriateness?
    ❑ Regulatory/compliance requirements?
    ❑ Capacity?
        Fundraising plan complete
        Funding secured and budget complete
        Communication plan complete
        Defining partners' roles
        Exit strategy
    ❑ Legal review of proposed venture?
    ❑ Statements of intent and interest?
    ❑ Higher office approval to proceed?

Defining the activity/product
- Scoping: focus group or scoping session
- Planning tools: models, data, techniques
- Themes and functions determined
- Meeting partners' needs

Instrument Development
- Negotiation
- Agreement complete

Planning and Design
- Planning workshop
- Projected uses and benefits/costs
- Implementation costs
- Cost estimates
- OM requirements
- Phasing
- Partners' roles in implementation and operation
- Dealing with changes
- Design plans complete

Implementation
- Contracts complete
- Recognition plan complete
- After action plan complete
- Evaluation
- Follow-up/corrections
- Celebration and recognition